SERVING THE TOTAL FOODSERVICE INDUSTRY

AUGUST 7, 1991

RESTAURANTS & INSTITUTIONS

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INSIDE:
Executive Salary Questionnaire

NEW DISHES FROM CALIFORNIA WINE COUNTRY

Give Vegetables ◁ Foreign Flair

MORE INSIDE!
SEE PAGE 4

A CAHNERS PUBLICATION

AUG. 7, 1991

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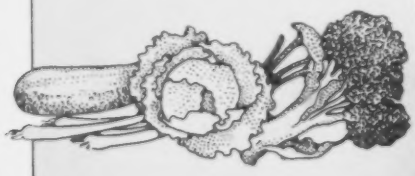

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42 R&I EXCLUSIVE: SUPERMARKETS STOCK COMPETITIVE FOODS

Lured by high margins and the public's demand for convenience, supermarkets across the country are pursuing the takeout business aggressively. Popular restaurant food also is hot at supermarkets—pizza, hot entrees, submarine sandwiches and extensive salad selections are common offerings eating away at profits for local foodservice operations. Our feature inventories the many new marketing and service innovations supermarkets are introducing.

76 CALIFORNIA FOOD GETS DOWN TO EARTH

After years of media hype, celebrity-chef worship and far-out flights of food fancies, California gets back to basics, naturally, with its own country cooking. California wines, year-round harvests and seafood from its coastal waters now appear in simple, satisfying ways that rival France's famous robust Provençal cuisine. Our Taste feature visits the new California kitchen for food ideas and recipes worth adapting for menus everywhere.

93 THE CUTTING EDGE OF PRODUCTIVITY

Devices that cut, chop and slice ingredients for today's menus save time and labor. These devices do their best work, however, when they are conveniently located and properly maintained. Our Equipment section focuses on logistics and daily, weekly and monthly maintenance check points.

98 VEGETABLES WITH A FOREIGN ACCENT

Even the most familiar vegetables can star on menus of the day in every foodservice operation. Innovative chefs are adding French, Asian and Italian flavors to everyday vegetables such as onions, potatoes, carrots and celery. Pick-of-the-crop vegetable ideas include a quick way to peel tomatoes and a list of vegetable dishes that can be served hot, cold or room temperature.

ABOUT THE COVER

Inspired by recipes from other lands, creative chefs bring a portrait of vegetables to life in our Food feature.

FOOD 98
Ordinary onion with extraordinary foreign flavor is just one of the common vegetables enhanced by Italian, French and Asian recipes.

MARKETING

LITTLE CAESARS AD SPENDING SOARED IN '90, REPORT FINDS

When it comes to ad-spending growth, Little Caesars rules. A study by LNA/Arbitron Multi-Media Service found that in 1990, the Detroit-based pizza chain hiked its ad budget for all media (network and cable TV, radio, magazines, newspapers and billboards) by a whopping 153.6%. McDonald's '90 ad spending, down 0.5%, was still big enough to make it the second-most-advertised brand of the year after AT&T. Total spending by the 10 most-advertised restaurant chains rose a moderate 5.8% in 1990 to $1.2 billion; all but 2% of that went to broadcast ads.

Chain	'90 ad spending ($ in $ Mil.)	% change from '89
McDonald's	$426.0	−0.5%
Burger King	177.6	1.2
KFC	118.4	−0.2
Pizza Hut	107.0	12.4
Wendy's	91.1	−1.9
Taco Bell	51.1	24.0
Domino's	50.5	11.9
Red Lobster	50.8	4.7
Little Caesars	54.4	153.6
Hardee's	42.9	−2.1

Source: LNA/Arbitron Multi-Media Service

McDONALD'S TODAY: CUTTING PRICES BUT NICKING PROFITS?

Times change—as they often do," says one current McDonald's TV commercial. "People are taking better care of themselves, and of their money."

These are changed times indeed for McDonald's. The burger superpower once held itself aloof from price-cutting, maintaining that price was just one part of the "value" factor in its QSC and V equation. Now McDonald's is offering selected low-priced items in almost all its stores and talking about price cuts in almost all its ads.

LOCAL OPTIONS

Unlike Taco Bell, whose high ratio of company stores enabled it to dictate a single value menu, McDonald's suggests several low-priced menus to regional franchise co-ops.

Most domestic franchisees are offering a version of the "Real Value Menu," rolled out nationally last February: Its 59-, 69-, 79-cent structure features a few basic sandwiches such as the hamburger, cheeseburger and sausage McMuffin, and small drinks and fries.

But in some areas of the country, hot competition or a cold local economy has led McDonald's co-ops to make deeper price cuts on more items. For example, licensees of some 360 McDonald's in the Southern California market debuted their "Low Down Menu" last December. It offers a wider range of discounted items than the Real Value Menu, including breakfast burritos for 59 and 79 cents.

FEAR OF DISCOUNTING

As a corporation, McDonald's traditionally has opposed deep, permanent price cuts, preferring to follow a strategy of short-term price promotions and reductions on selected combination meals such as the Happy Meal. That attitude has changed in the light of the apparent success of lower everyday prices at Taco Bell and Wendy's.

Still, company leaders maintain that McDonald's has always been a strong price contender, but that price alone is not enough to distinguish a chain. "You can get a deal anywhere now," Chairman and CEO Michael Quinlan told shareholders in April. "The value menu is important, but it's not enough. To differentiate ourselves from our competitors, we have to do more." That "more" centers on menu expansion, with the accelerated rollout of new products such as breakfast burritos.

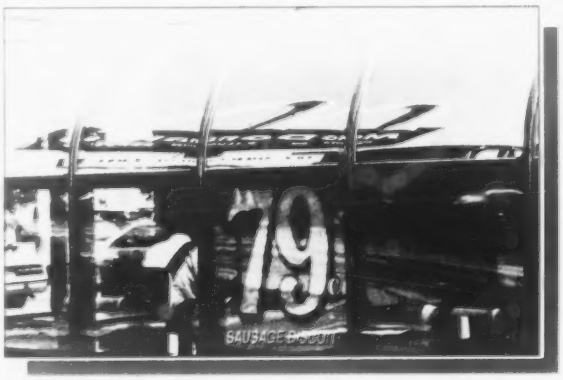
But the new low prices might be doing their job. Research from Merrill Lynch, New York, reports that McDonald's monthly domestic same-store sales are up slightly since March. It attributes this progress to both value-pricing and new product introductions.

PROFIT PROTECTION?

But many observers doubt that increased sales can make up for slimmer profit margins. "The recession is going to stick around, and anyone competing on price is looking at a long haul," says restaurant analyst James Uehlmer of the Kansas City, Mo.- brokerage firm Siskind Wells. "McDonald's operating costs are high, and they've already had several quarters of domestic profit erosion. Can they get low and *stay* low long enough to compete?"

That question might be answered this month, when the Real Value Menu marks its six-month anniversary—and perhaps gives a clearer picture of its impact on the bottom line.

—Brian Quinton



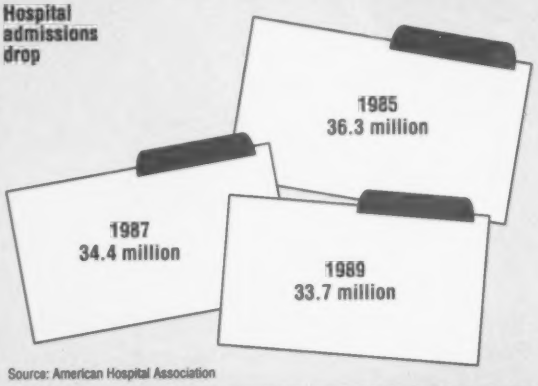
▲ **Regional franchise co-ops can tailor McDonald's value strategy by choosing from a "menu" of different menus.**

TRENDS

HOSPITAL VITAL SIGNS

A shakeout in the hospital industry has forced foodservice operations to become more efficient and self-reliant.

Hospital admissions drop

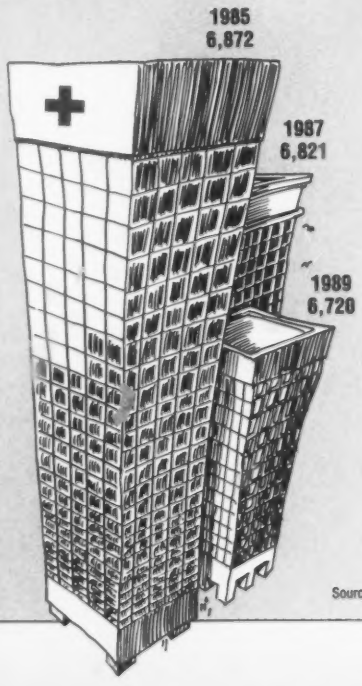


Source: American Hospital Association

Hospital foodservice sales rise

Source: National Restaurant Association

Number of hospitals declines



Source: American Hospital Association

FOOD COURTS BEAT RECESSION IN 1990

Sales at mall food courts grew 24% from 1989 to 1990, according to *CarlsonReport*'s annual food-court survey. The gain is the largest logged since the Indianapolis-based publication began tracking food-court sales more than six years ago.

The study, which is designed to assist tenants and developers in projecting the profitability of food courts, also found:

- Barbecue posted a 68% gain in sales from 1989 to 1990, which was the largest recorded by any food category. Potatoes, at 54%, took second place, followed by seafood, with a 47% increase in sales volume.
- Chicken concepts boasted the highest sales-per-square-foot figures in 1990—$473.05—besting hamburgers by almost $20 and hot dogs by almost $30.
- Chicken took 11.44 cents of every food-court dollar in 1990. Hamburgers grabbed 9.70 cents, and pizza finished with 8 cents.
- The top gainers in share of the food-court dollar were: chicken, 55%; hamburgers, 53%; potatoes, 21%; pizza, 18%; and Oriental, 11%.
- The top losers of share of the food-court dollar were: hot dogs, −30%; cookies, −28%; ice cream, −25%; and yogurt, −23%.
- National brands are supplanting local tenants in food courts. In 1989, 33% of food courts showed local concepts outnumbering national chain units. Last year, only 4% of food courts reported local concepts outnumbering national brands.
- Almost 90% of shopping-mall patrons combine eating with shopping.
- Customers spend $5 on average in the food court.
- Of 15 food segments considered, only ice cream suffered a drop in sales, 1%, from 1989 to 1990.

The study cited the increased penetration of national chains and improved performance by mall administrators in the areas of tenant selection and food-court marketing as two possible reasons for the strong overall increase in food-court sales in 1990.

—Rajan Chaudhry

MALL TRENDS REVEAL CHANGING TASTES

(Top food-court sellers)

1985

1. Pizza
2. Chicken
3. Hamburgers
4. Oriental
5. Sandwiches
6. Pastry/croissants
7. Mexican
8. Hot dogs
9. Cookies
10. European

1990

1. Chicken
2. Hamburgers
3. Pizza
4. Mexican
5. Oriental
6. Sandwiches
7. Seafood
8. Pastry/croissants
9. Potatoes
10. Others

Source: *CarlsonReport* Food Court Surveys

BUSINESS TRENDS

Retail vs. Restaurants: THE FOODSERVICE FIGHT IS ON

By Beth Lorenzini

Grocery stores have bagged more than 12% of the takeout market with a wide array of ready-to-eat sandwiches, salads and entrees. *R&I* checks out the supermarket industry's strategy—and restaurateurs' counterattack.

Fresh-baked pizza, red beans and rice, wild rice soup—dining out is a welcome change from the old standby meals prepared at home. The twist, however, is that people *are* eating such foods at home—but they're picking them up ready to eat at the local supermarket.

Across the country, supermarkets are pursuing takeout aggressively, lured by high margins and the growing trend toward convenience. Sales of supermarket takeout food reached $12.7 billion in 1990 and will hit $15 billion by 1994, according to Find/SVP, a New York-based market research company. In the process, supermarkets are taking share directly from restaurants.

According to the report, fast-food outlets, which commanded 67% of takeout sales in 1989, will see their share slashed 5% by 1994. Supermarkets, meanwhile, will gain 5%, capturing 17% of the market.

Part of supermarkets' attraction to prepared foods is the high profits they generate. Supermarket total gross margins average 23.5%. Prepared foods average a 53.1% gross margin, and contribute 5.5% to supermarkets' bottom line, according to *Supermarket Business* magazine.

GOODS *AND* SERVICES

Foods that are popular in the restaurant industry are just as hot in supermarkets: Made-from-scratch pizza, hot entrees, salads, submarine sandwiches and frozen yogurt have become common offerings in supermarkets' prepared-foods sections.

Ethnic takeout outlets within stores are further blurring the line between

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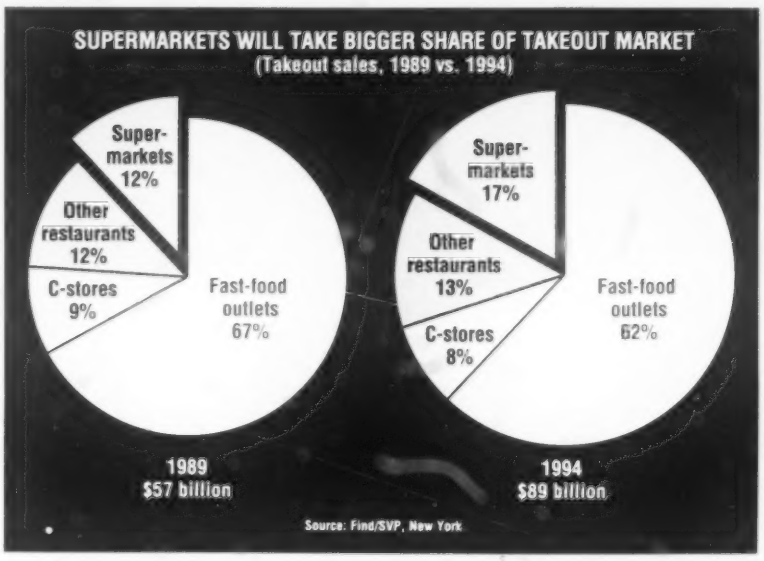

SUPERMARKETS

Supermarket deli sales account for about 4.3% of total store sales, but 14.6% of gross profits.

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retailers and restaurants. In-store Chinese takeout counters, for instance, are offered at Dillon's, Hutchinson, Kan.; Wegman's, Rochester, N.Y.; Bel Air Market, Sacramento, Calif.; and Smith's Food and Drug, Salt Lake City, to name a few local supermarket chains.

Smith's Food and Drug, which has almost 100 stores throughout the Southwest, has put its Chinese Kitchen concept in 25 stores in the past two years. Eleven more stores are planned for southern California in the next year, and every one of them will feature a Chinese Kitchen. The menu consists of about 30 selections offered for lunch and dinner; checks average about $3. The supermarket chain also offers homemade tortilla-rias and yogurt shops within many of its stores.

The company declined to give sales figures or the percentage of total store sales the Chinese Kitchens contribute. But the fact that all new stores will include a Chinese Kitchen is one indication of the concept's success.

To match fast-food's service, supermarket chains are offering fax ordering, delivery, drive-thru service, extra express checkout lanes that open for lunch and separate registers for prepared-food purchases. Outside the store, catering has gone far beyond the deli platter to include tailgate party assortments, boxed lunches that can be ordered by fax and/or delivered to local businesses, children's parties and even weddings. Stores also offer newsletters, recipe cards, food consulting and cooking schools.

At Buehler's, based in Wadsworth, Ohio, four of the family-owned chain's nine units hold cooking classes. On the day *R&I* called, a group of 6- to 12-year-olds had just finished making tacos and fresh fruit kebabs and decorating their own cakes. The cooking school series is so popular for children's parties and club outings that the classes are booked months in advance, says Joy Dawson, director of cooking schools.

DINING IN THE STORE

In 1990, about 14% of supermarkets had delis with satellite restaurants or cafeteria services—that's up from 8% in 1984, according to *Progressive Grocer* magazine.

Ukrop's, based in Richmond, Va., has a separate grill and wok area,

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The 100-unit Smith's chain will build Chinese Kitchen takeout restaurants into all its new stores; currently, 25 of its 100 stores sport Chinese Kitchens.

SUPERMARKET DELI FOOD FACTS

1. In 1990, prepared foods accounted for 2.7% of total store sales and contributed 5.5% to the total store bottom line. Prepared-food gross margins average 53.1%.

2. About 40% of supermarket delis offer catering services, which range from deli platters, tailgate party assortments and boxed lunches to children's parties.

3. The typical total service deli takes up 3.9% of total floor space, an average of 1,470 square feet.

4. Deli department sales average $11,700 a week (about 37% of which is in prepared foods; the remainder, sliced meat and cheese).

5. Delis need an average of 7.2 workers to operate per store.

6. Total in-store deli sales were estimated at $12.7 billion in 1990, an increase of 12% over 1989.

7. More than 70% of the nation's 30,750 supermarkets have a service deli. But only about 20% have extensive prepared-food programs. That figure will rise, say analysts.

Sources: [illegible]

SUPERMARKETS

Catering, food courts, fax ordering and delivery—supermarkets have entered restaurant territory.

continued from page 48

where everything from burgers to stir-fried meals can be purchased and eaten on site on a 50-seat outdoor patio. This area has its own entrance, making both the grill and prepared foods section readily available to customers. In fact, Ukrop's considers itself a restaurant: "Our units are restaurants—we just happen to have grocery stores attached," says Brian Salus, director of foodservices.

When Vincent's opened in Birmingham, Ala., in 1988, a 75-seat restaurant was part of the original plan. The menu includes a daily selection from a fresh fruit bar, four hot soups, two cold soups, four entrees (such as mahi-mahi, Jamaican chicken, lasagna, Beef Burgundy and jambalaya), 10 hot vegetables, pizza from a wood-burning oven, ice cream and yogurt. "The restaurant does a *very* good business," says Manager Don Wilson, although he declined to give sales figures.

The 110-seat Loft Cafe, located in V. Richards, Brookfield, Wis., pulls in about $7,000 in sales each week, with checks averaging $5 to $6. An abundance of businesses in the area, part of suburban Milwaukee, supplies the supermarket restaurant with a steady base of customers, especially at lunch.

The operation's two Culinary Institute-trained chefs prepare an assortment of made-from-scratch soups, sandwiches and salads, as well as specialty entrees such as lobster quesadillas, mesquite-grilled chicken and pastas in homemade sauce. A $3.95 Souper Lunch—a sandwich half, a cup of soup, a pickle and chips—is one of the Loft Cafe's best sellers, as is the store's signature chicken cashew salad.

SUPERMARKET SIGNATURES

Many stores find that signature dishes can make them a destination spot—a domain traditionally ruled by restaurants. One reason: More supermarkets are hiring restaurant chefs who are experts in creating such dishes.

The Culinary Institute of America, Hyde Park, N.Y., reports that more graduates are looking at the supermarket segment for viable career opportunities, placing restaurants in direct competition with supermarkets for qualified employees.

"Not only are the hours and benefits attractive, but our graduates in supermarkets are pleased with the amount

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SUPERMARKET FOODSERVICE TRENDS

CONVENIENCE: Ukrop's, Richmond, Va., takes lunch orders by fax. Larry's Market in Seattle delivers. Many supermarkets offer separate entrances and registers, and a few are entering into drive-thru service.

SINGLE/DOUBLE SERVINGS: Rather than selling by the pound, many supermarkets are placing prepared foods into single- and double-serving portions and pricing them accordingly.

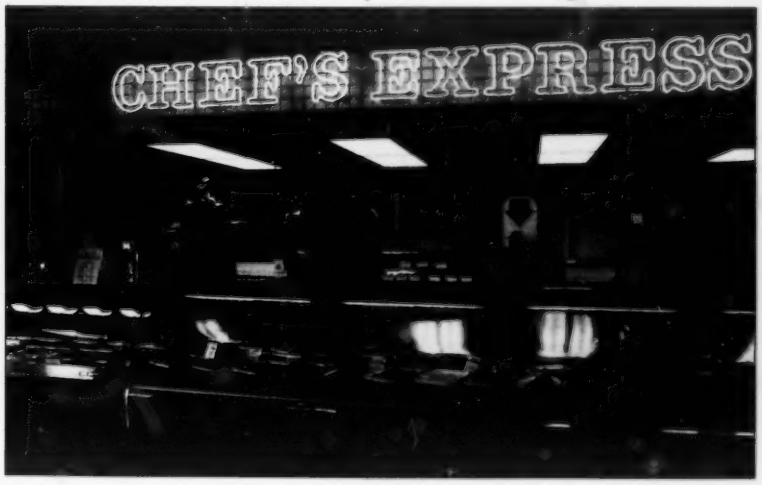
ETHNIC KITCHENS: More international dishes will appear, especially cuisines with Hispanic and Asian accents.

NUTRITION: More supermarkets will be preparing and marketing low-calorie, low-fat, low-sodium and low-cholesterol offerings. Many supermarkets now have the expertise of chefs who are creating flavorful entrees using herbs, spices, marinades and vegetable stocks.

FOOD COURTS: Dividing menus into merchandising categories works in supermarkets. Ice cream parlors, pizza parlors, grills and Chinese takeout outlets are growing in popularity.

Source: Howard Riggott & Associates, Dayton, Ohio.

Chef's Express, the deli counter at Schnucks Markets, St. Louis, offers upscale takeout salads and hot entrees, and sports its own cash register.



SUPERMARKETS

Executive chefs' signature deli dishes are designed to make supermarkets destination locations.

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of freedom they have to be creative in their food preparation," says Del Hargis, director of alumni affairs for the CIA. "Often, when graduates enter the restaurant segment, they find themselves dealing with fewer scratch preparations and more convenience products than they had expected. Supermarkets seem to rely on the chef's talents in developing new recipes."

Sue Anne Becker, a 1977 Culinary Institute graduate who works for Dominick's Finer Foods, Northlake, Ill., just completed her Chef's Collection, a series of four ethnic salads: Sesame Noodle, Cajun Red Beans and Rice, English Potato Salad and Lemon Rice with Vegetables. "It's been a real challenge to come up with unusual foods that appeal to a broad cross section of customers," says Becker. "But that's what I love about this job."

Such sophistication is showing up in supermarkets around the country, according to Howard Solganik, a Dayton, Ohio-based supermarket consultant. He has compiled a list of signature dishes:

○ Byerly's, Edina, Minn., sold so much of its wild rice soup that it had to go to central kitchen production to keep up with the demand. Now, even other supermarkets sell the soup, frozen.

○ Westport, Mass.-based Lee's Supermarket mixes cheese, garlic and eggs into its bread dough—the markets often sell out of this cheese bread.

○ Apricot chicken and a secret-recipe fried chicken are hot sellers at Heinen's in Cleveland, Ohio.

○ Dayton, Ohio-based Dorothy Lane's Markets patented Killer Brownie weighs ½ pound and is part of all the chain's box lunches. When it was offered through a mail-order catalog, orders for 20,000 came in.

○ Around Christmas, especially, demand for Encino, Calif.-based Gelson's poached salmon is so high that the eight-unit chain shrink-wraps extra orders and sells them through the self-serve case. The salmon is accompanied by a card with reheating and serving suggestions.

RESTAURANTS RETALIATE

Restaurateurs, for their part, are actively defending against encroachment by supermarkets.

McDonald's, Oak Brook, Ill., says it considers supermarkets, and anyone who sells food, direct competition. In

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About 20% of the nation's supermarkets boast extensive prepared-food offerings. But pressure on restaurants is rising as penetration increases.

BEST SELLERS

A look at this sampling of foods available to go in supermarkets might give restaurateurs an idea of what they're up against.

SALADS: Besides the salad bar, which draws strong lunch and dinner business, prepared salads are gaining ground. These days, customers are as likely to find roast chicken and wild rice salad as they are potato or macaroni.

ETHNIC ENTREES: Pastas with sauces, moo goo gai pan and fajitas are served hot or cold in oven-proof containers.

FRIED/ROTISSERIE CHICKEN: Buy enough for the whole family, add a few sides like artichoke heart salad and in-house prepared minestrone soup, and dinner is complete.

CHINESE FOOD: Supermarkets are setting aside entire sections for takeout Chinese food.

PIZZA: Wegman's, Rochester, Minn., offers 30 variations on a signature crust made in house. Dorothy Lane's Markets, Dayton, Ohio, features a wood-burning stove to give made-from-scratch pizzas authentic flavor. Customers can order, shop for groceries and pick pizza up on the way out.

To fight back, a Minnesota McDonald's franchisee sells eggs, milk and other staples at the restaurant.

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Minnesota, McDonald's has given the go-ahead to a franchisee who is attempting to turn the tables on supermarkets by offering its own one-stop-shopping experience. The franchisee offers eggs, milk and other commodity items for sale in an in-store display case.

Last year, TCBY, Little Rock, Ark., saw store sales drop, largely as a result of frozen yogurt offerings at supermarkets and other retail outlets. The chain responded by granting franchisees permission to sell selected yogurt products through local grocery stores in a limited area surrounding their units. It also formed area marketing partnerships to sell TCBY yogurt to large supermarket chains.

"I think we can learn a lot from supermarkets," says Ira Hermann, CEO of the Columbus, Ohio-based Rax sandwich chain. "For one thing, we can learn how to merchandise, because that's what they do. They don't necessarily have someone saying 'Hi, welcome to the deli,' they just put the food out and let it speak for itself."

Smaller operators are feeling the sting of this expertise as well, and they are scrambling to maintain an advantage. "I know that we're losing some business to the supermarket by us," says James Tzanetis, manager of Vic's Pizza, Manchester, Conn. "I've gone into the store and watched people make lunch salads. But that just pushes us to fight back."

Vic's has added items such as chicken wings and calzones that customers can't get at that particular supermarket deli. The restaurant has held prices, and has cut its pizza production time by a third, he says. Vic's also sends out coupons to local businesses to increase lunch traffic. "If people are looking for a good sit-down meal, they'll still come to us."

Hermann agrees, saying that while supermarkets might have an edge on delivering convenience, restaurants' trump card is service. "Restaurants can deliver service, and we've got to learn to run our restaurants to constantly take care of customers," he says. "Supermarkets can't do that."

Rajan Chaudhry contributed to this article.

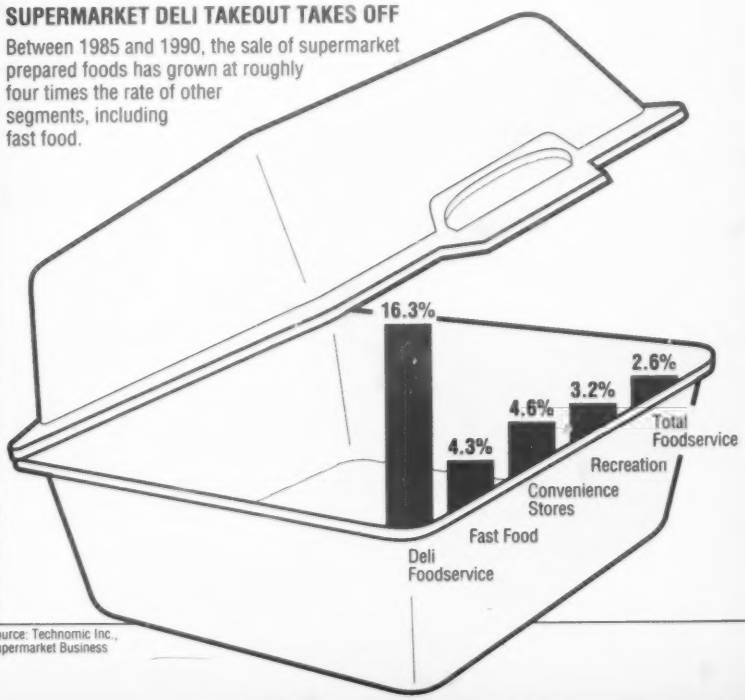
NATIONAL CHAINS BREAK INTO THE SUPERMARKET MARKET

Some restaurant chains view supermarket takeout as an opportunity and are starting to set up mini-stores and kiosks in supermarkets the same way they've entered into airports, stadiums and institutions.

- Rather than prepare its own pizza, 75-store Abco, Phoenix, is testing Pizza Hut kiosks.
- Two Holiday Pizz Stores, Minneapolis, removed their snack bars and leased the space to McDonald's, which pays rent and a percentage of sales to the stores.
- Dominick's Finer Foods, Northlake, Ill., leases space to Seattle-based Starbuck's Coffee in five of its 87 units. Customers can sip espresso while they shop.
- Mrs. Fields displayed a booth at the Food Marketing Institute Show in Chicago to draw the interest of supermarket managers.

SUPERMARKET DELI TAKEOUT TAKES OFF

Between 1985 and 1990, the sale of supermarket prepared foods has grown at roughly four times the rate of other segments, including fast food.



Source: Technomic Inc., Supermarket Business

ACTION EXPRESS

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